Chapter 2

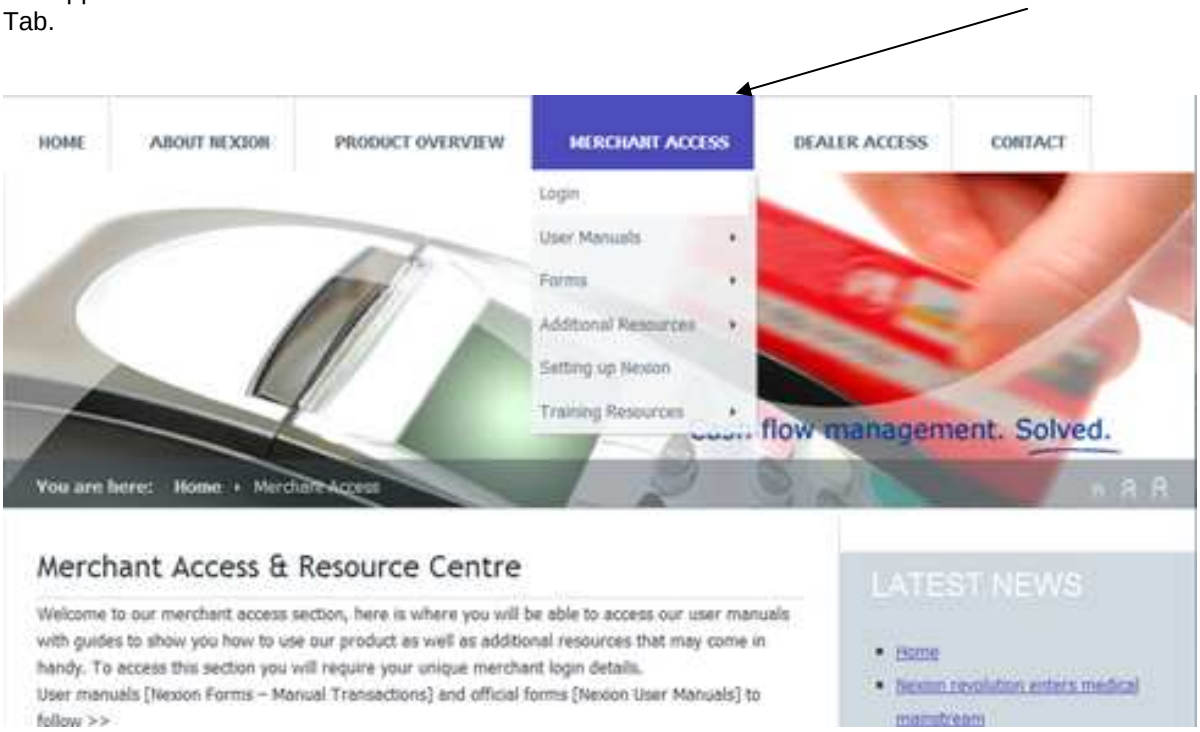
Getting Started

Congratulations on installing Nexion. There will be a program icon located on your Windows Desktop click on this icon to start the Nexion application.

In the activation pack you received from Nexion you will find the following items, please familiarize yourself with them at this time as we will refer to them in your training. At any time you can call our call centre on 0861 NEXION for customer support or to schedule additional training.

- Window Decals – please affix in a visible position to indicate to clients that you now accept credit and debit cards.
- Nexion User manual
- Nexion Quicklinks guide
- Starter pack containing:
  - Manual Credit Card Forms – in case of power outages
  - Stop Order Transaction Forms (ACB) – for your stop order facility
  - Manual Credit Refund Forms – in case of a refund
  - Merchant Maintenance Forms – to amend any details pertaining to the practice
    I.e. Change of address, telephone, user or bank details

All support documentation can also be found on our website **www.nexion.co.za** in the Merchant Access Tab.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PRODUCT OVERVIEW
MERCHANT ACCESS
DEALER ACCESS
CONTACT
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Forms
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Setting up Nexion
Training Resources
flow management. Solved.
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Merchant Access & Resource Centre
Welcome to our merchant access section, here is where you will be able to access our user manuals with guides to show you how to use our product as well as additional resources that may come in handy. To access this section you will require your unique merchant login details.
User manuals [Nexion Forms – Manual Transactions] and official forms [Nexion User Manuals] to follow >>
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User Manuals, under the Merchant Access Tab
In the "User Manuals" section, find an online user manual separated into easy to use sections.

Forms, under the Merchant Access Tab
In the "Forms" section, find downloadable forms in PDF i.e., Manual Credit Card, Stop Order Transaction, Manual Credit Refund Forms and Merchant Maintenance Forms.

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Additional Resources, under the Merchant Access Tab
In the “Additional Resources” section, find user manuals on integrated transactions:
GoodX
Medemass – Elixir
Health Focus – Eminance
Vericlaim

Setting up Nexion (Integration), under the Merchant Access Tab
In the “Setting up Nexion” section find user manuals on setting up Nexion for integration.

Training Resources, under the Merchant Access Tab
In the “Training Resources” section find a guideline on using Nexion to manage your cash flow.

Starting the program

1. Double-click on the **Nexion icon** on your desktop.

2. The User Login screen is displayed.

Nexion will be pre-installed with the users as specified on your application form.

3. Select user name from the dropdown list.

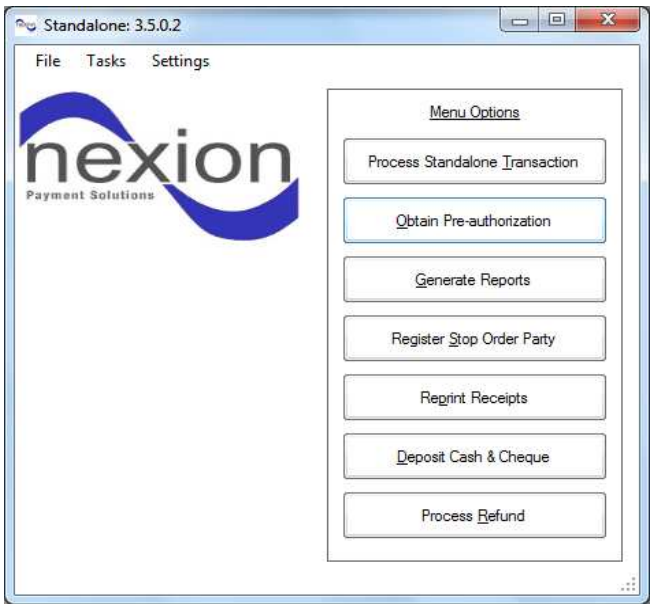
The default setting for the Password is: nexion (lower case), please personalise it immediately to a password only you know.

4. Type in your password

Please Note:
When an incorrect password is typed, Nexion will display the following message:

5. Select the <OK>. You will return to the User Login screen. Select your username and Re-enter your password

6. After you have successfully logged into Nexion, the main menu will be displayed.



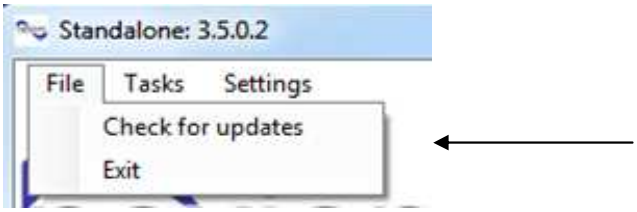
Setting up Nexion

Tabs on the Main menu screen are used to set up and maintain your Nexion experience

On the top bar of the screen:

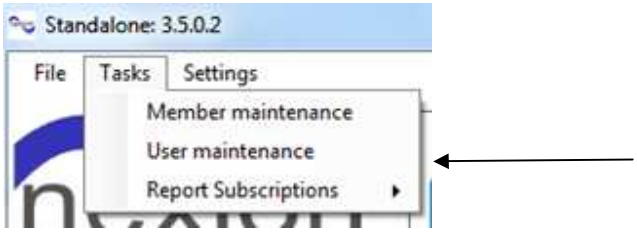
File Tab -

Select “File” drop down to check for new software updates and to exit the program



Tasks Tab –

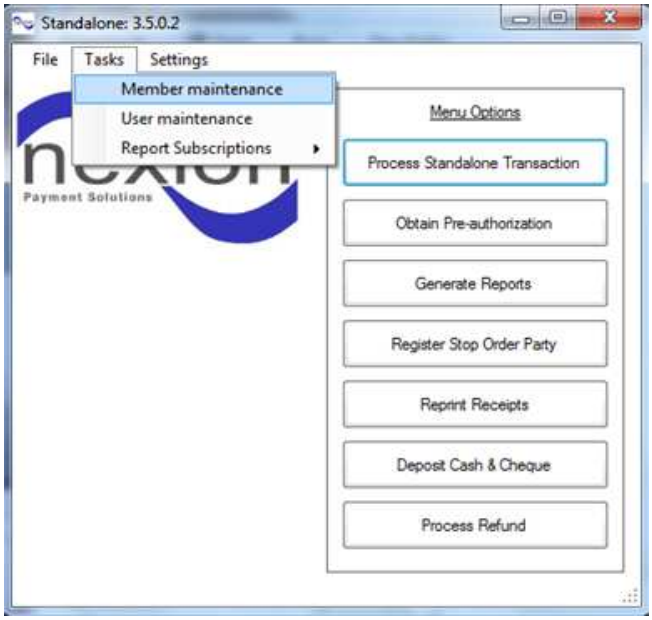
Select “Tasks” to (A) View Debit order party details,(B) User Maintenance and (C) Report subscriptions



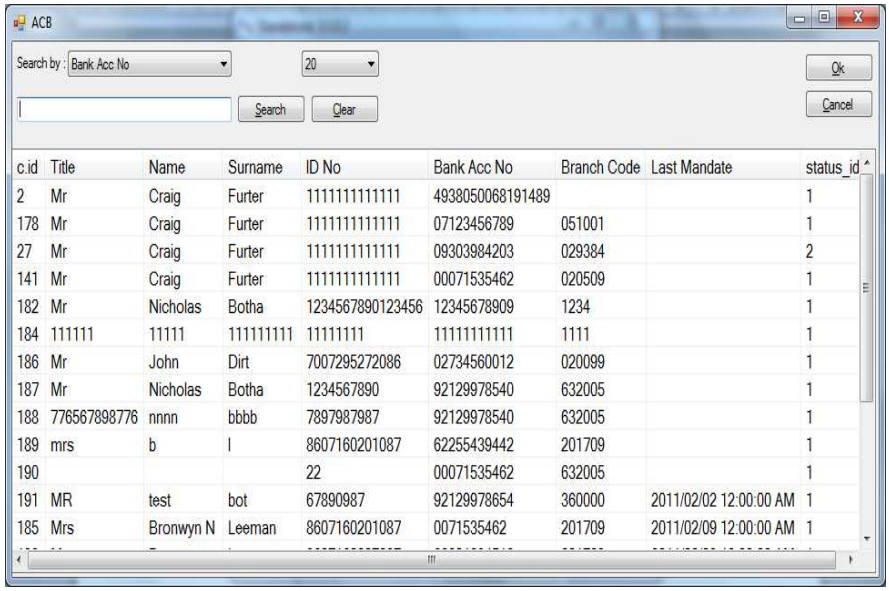
A. View Debit Order Parties

To view a previously registered stop order party do the following:

1. From the “Nexion Main Menu”, select the “Tasks” tab. From the drop down menu select “View Debit Order Party”



2. A search screen is then displayed



c.id	Title	Name	Surname	ID No	Bank Acc No	Branch Code	Last Mandate	status_id
2	Mr	Craig	Furter	1111111111111	4938050068191489			1
178	Mr	Craig	Furter	1111111111111	07123456789	051001		1
27	Mr	Craig	Furter	1111111111111	09303984203	029384		2
141	Mr	Craig	Furter	1111111111111	00071535462	020509		1
182	Mr	Nicholas	Botha	1234567890123456	12345678909	1234		1
184	111111	11111	111111111	11111111	11111111111	1111		1
186	Mr	John	Dirt	7007295272086	02734560012	020099		1
187	Mr	Nicholas	Botha	1234567890	92129978540	632005		1
188	776567898776	nnnn	bbbb	7897987987	92129978540	632005		1
189	mrs	b	l	8607160201087	62255439442	201709		1
190				22	00071535462	632005		1
191	MR	test	bot	67890987	92129978654	360000	2011/02/02 12:00:00 AM	1
185	Mrs	Bronwyn N	Leeman	8607160201087	0071535462	201709	2011/02/09 12:00:00 AM	1

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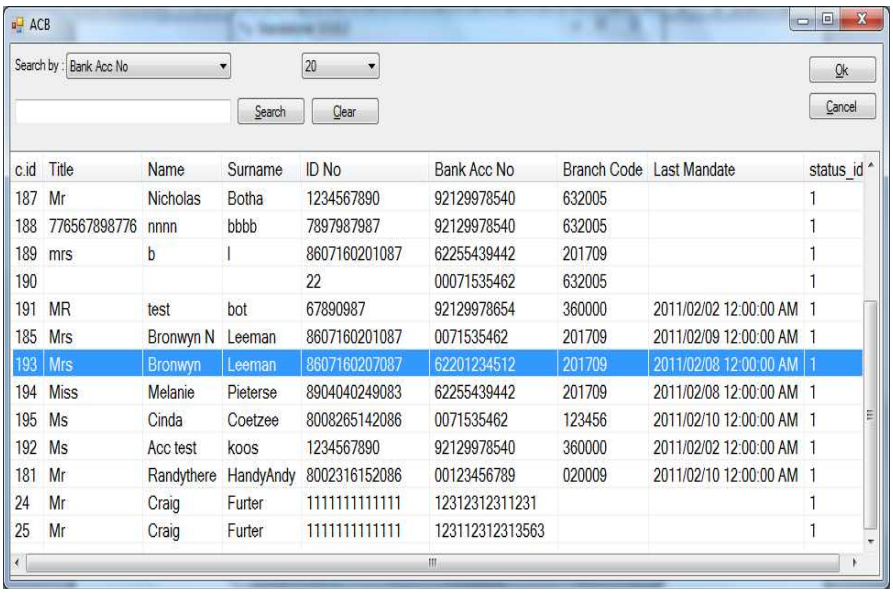
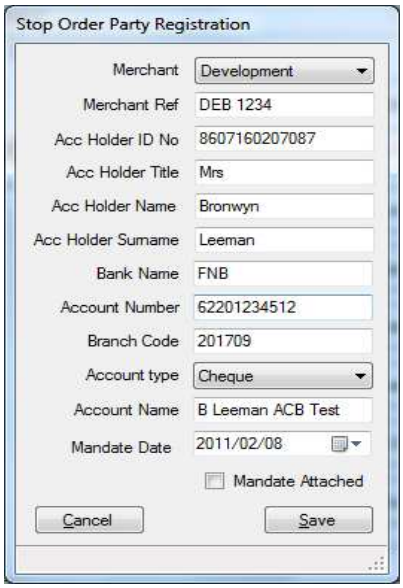
3. Select the stop order party to be viewed.



c.id	Title	Name	Surname	ID No	Bank Acc No	Branch Code	Last Mandate	status_id
187	Mr	Nicholas	Botha	1234567890	92129978540	632005		1
188	776567898776	nnnn	bbbb	7897987987	92129978540	632005		1
189	mrs	b	l	8607160201087	62255439442	201709		1
190				22	00071535462	632005		1
191	MR	test	bot	67890987	92129978654	360000	2011/02/02 12:00:00 AM	1
185	Mrs	Bronwyn N	Leeman	8607160201087	0071535462	201709	2011/02/09 12:00:00 AM	1
193	Mrs	Bronwyn	Leeman	8607160207087	62201234512	201709	2011/02/08 12:00:00 AM	1
194	Miss	Melanie	Pieterse	8904040249083	62255439442	201709	2011/02/08 12:00:00 AM	1
195	Ms	Cinda	Coetzee	8008265142086	0071535462	123456	2011/02/10 12:00:00 AM	1
192	Ms	Acc test	koos	1234567890	92129978540	360000	2011/02/02 12:00:00 AM	1
181	Mr	Randythere	HandyAndy	8002316152086	00123456789	020009	2011/02/10 12:00:00 AM	1
24	Mr	Craig	Furter	1111111111111	12312312311231			1
25	Mr	Craig	Furter	1111111111111	123112312313563			1

4. The “Register Stop Order Party” screen is displayed (see chapter—on registering a stop order party)



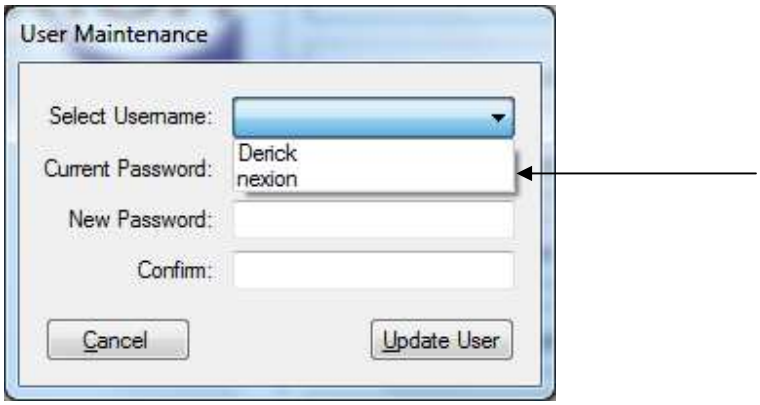
B. User Maintenance

Changing your password (first time user)

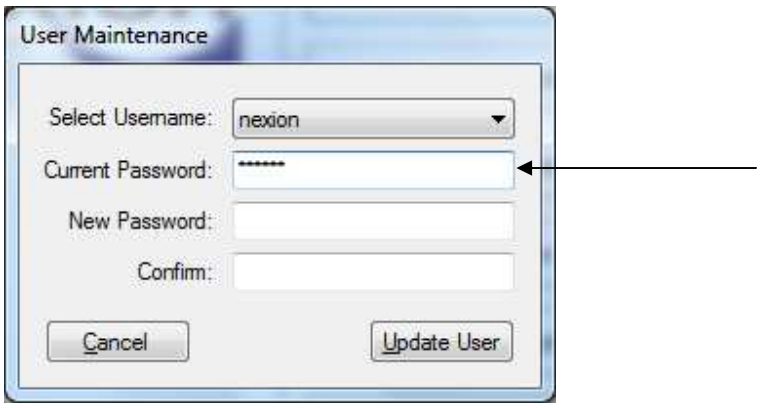
After Initial log on, the user password needs to be changed, to do this:

1. From the “Nexion Main Menu”, select the “Tasks” Tab. From the Tasks drop down menu, select the “User Maintenance” Option”. The “User maintenance” screen is displayed.

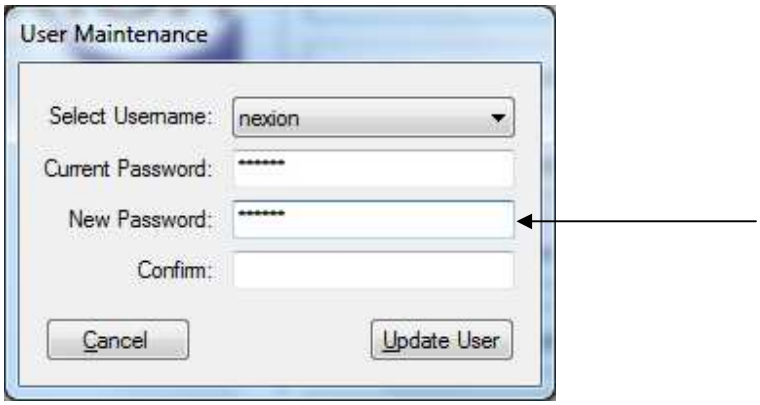
2. Select your Username from the dropdown list.



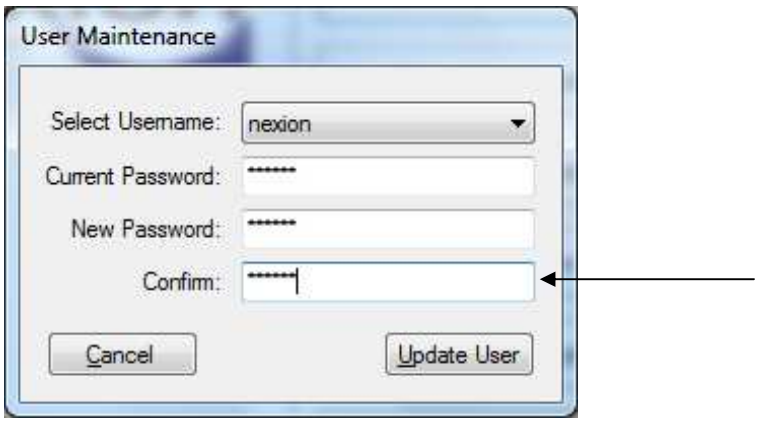
3. Type in your Current password.



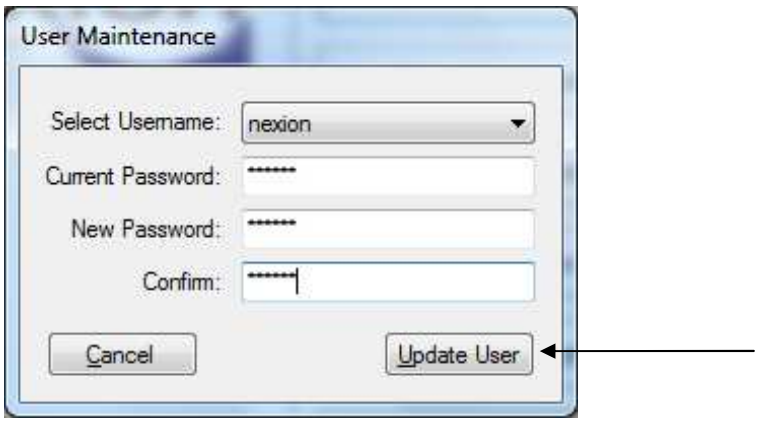
4. Type a new password in the New password field.



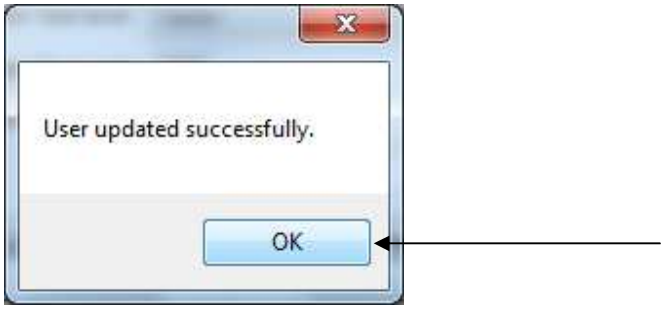
5. Type in your new password in the Confirm field.



6. Select the Update User button.



7. If the system accepts the changes the “User updated successfully” screen will be displayed. Select the <OK> to continue. The Nexion system will update the changes and automatically return the user to the main menu screen.



Note:

When an incorrect current password is typed, Nexion will display the following message:

Click on the OK button. You will be returned to the user maintenance screen. Select your user name and retype your password.

Note:

When an incorrect new password is typed into the confirmation field, Nexion will display the following message:

Click on the OK button. You will be returned to the user maintenance screen. Select your user name and retype your password.

To reset your password – contact our call centre on 0861 639 466
To add or remove a user – contact our call centre on 0861 639 466

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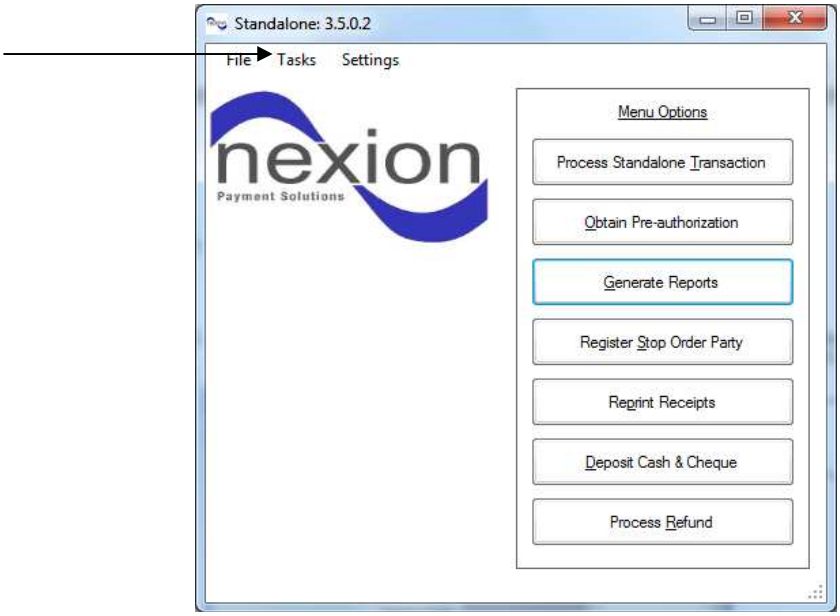
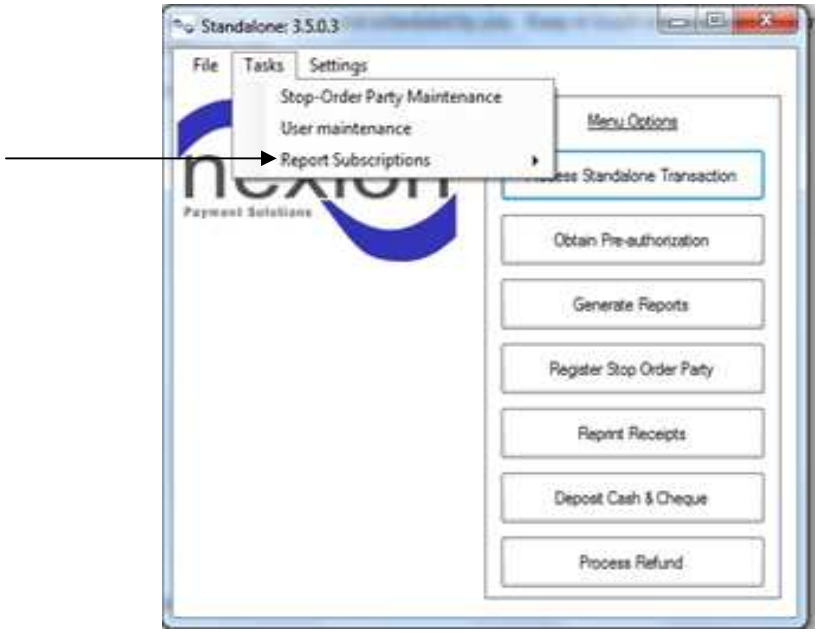
C. Report Subscriptions

Nexion now allows you to subscribe to daily, weekly and monthly reports; reports will be delivered to any e-mail addresses specified and scheduled by you. Keep in touch with your cash flow by having reports delivered to you.

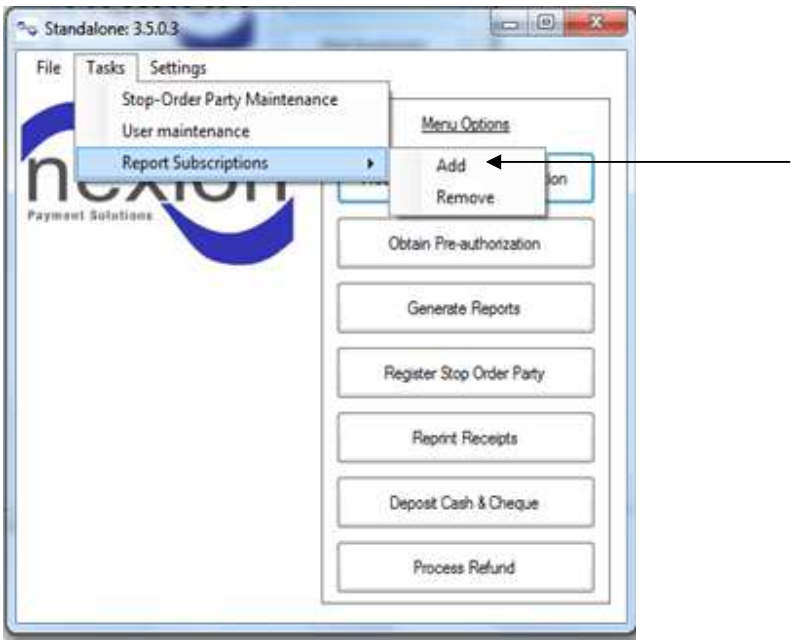
1. From the Nexion Main menu select the Task tab.



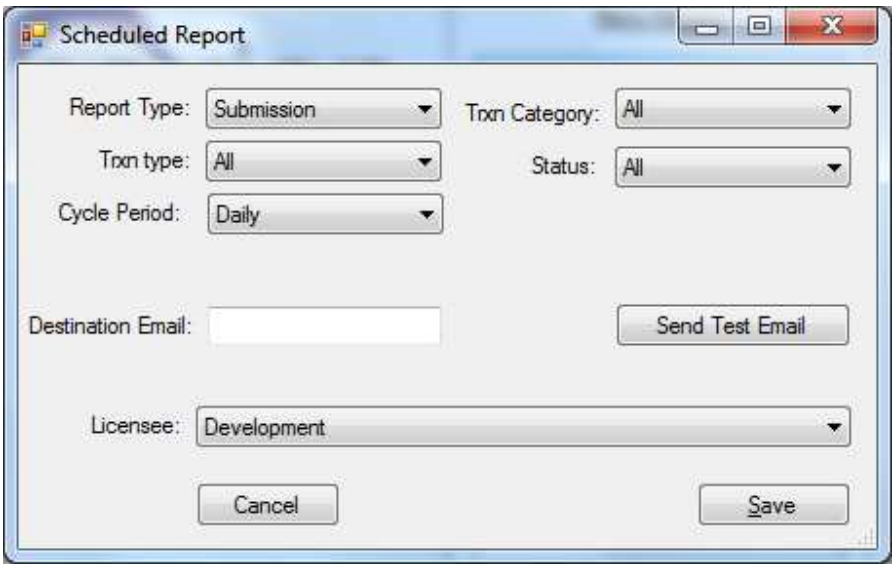
2. Select Report Subscriptions.



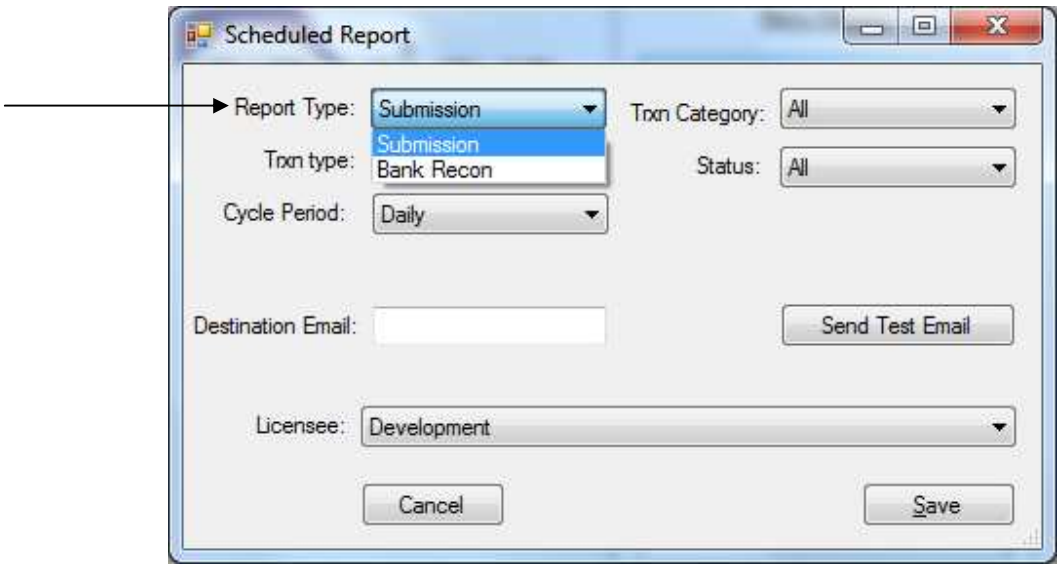
3. Select Add.



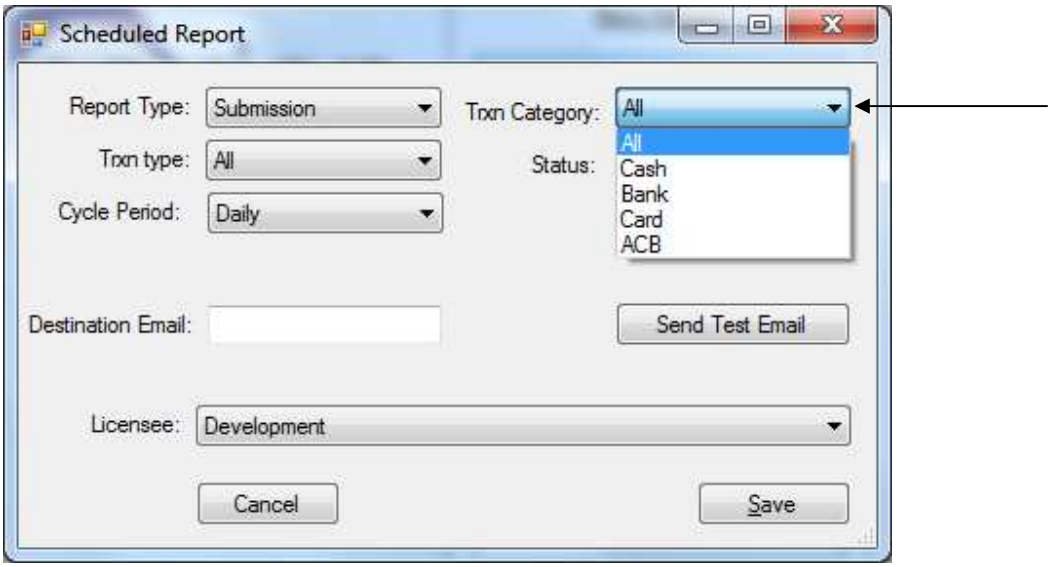
4. A Schedule Report screen will be displayed.



5. Select the report you wish to be subscribed to from the drop down.



6. Select the transaction category from the drop down.



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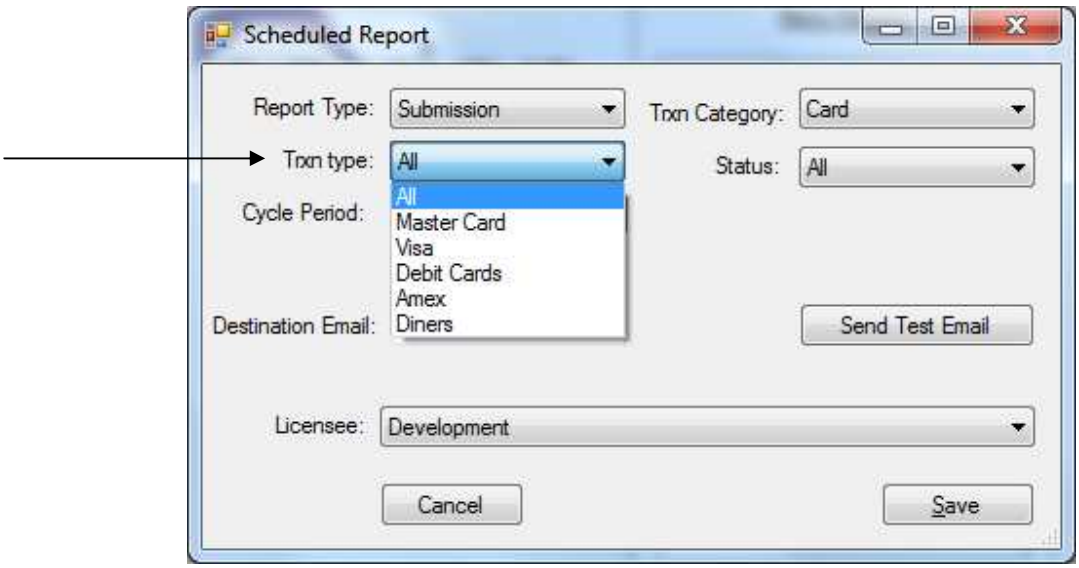
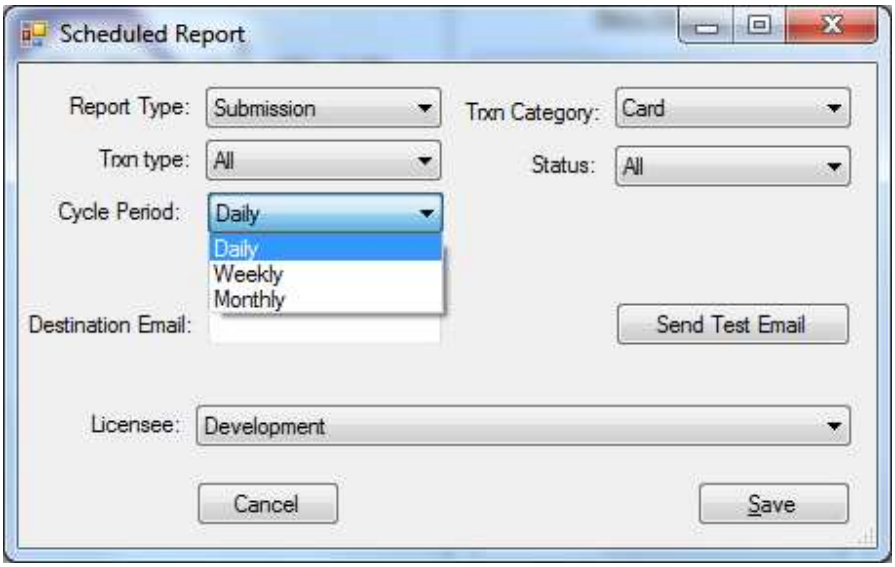
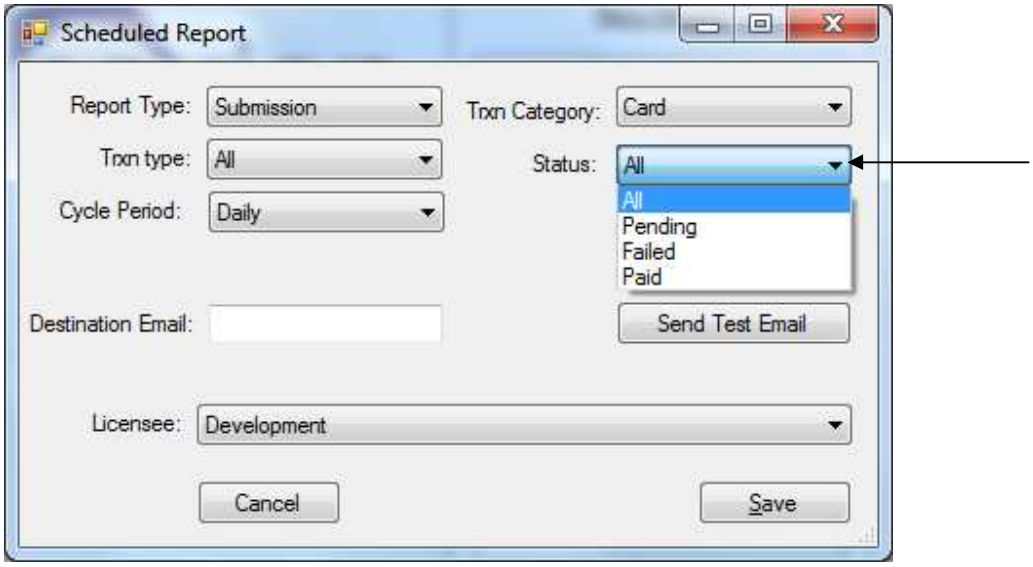
7. Select the transaction type from the drop down.



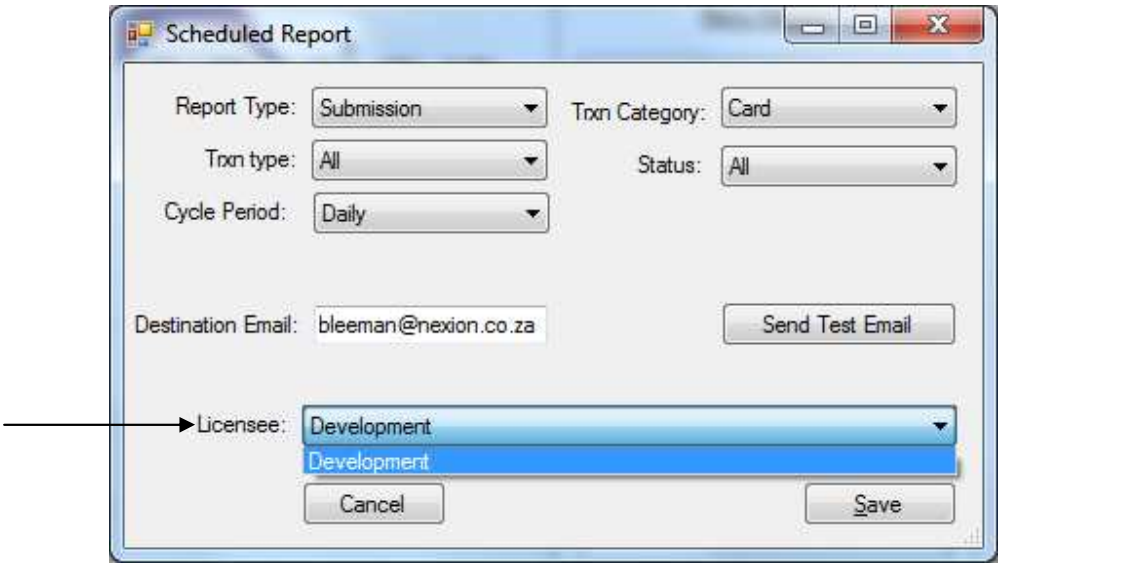
8. Select the Cycle Period from the drop down.



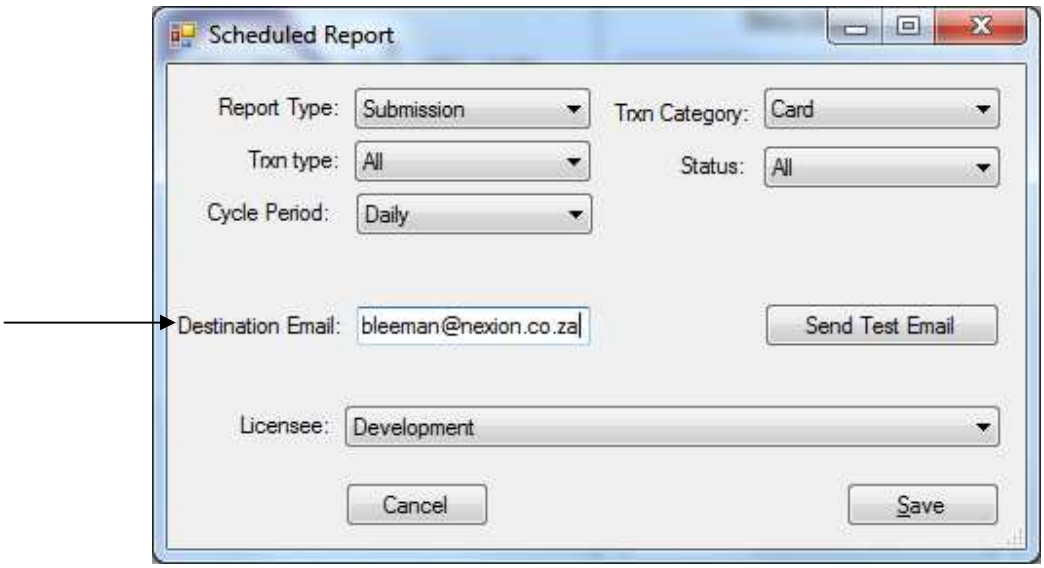
9. Select the status from the drop down



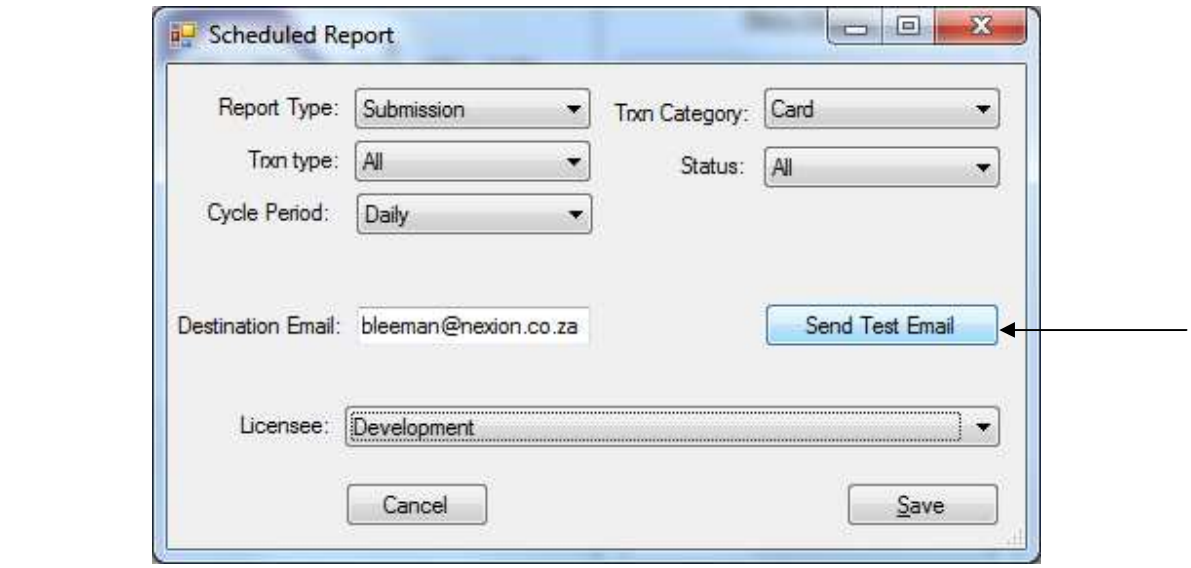
10. Select Licensee from the drop down.



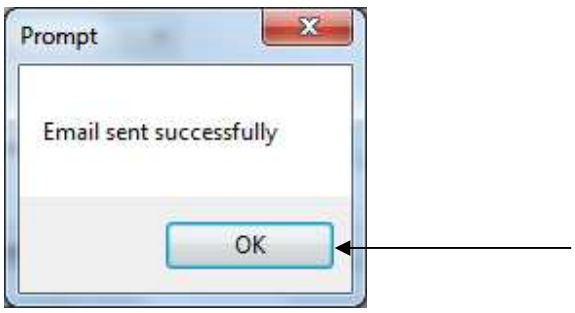
11. Type in the Destination Email address.



12. Select Send Test Email.

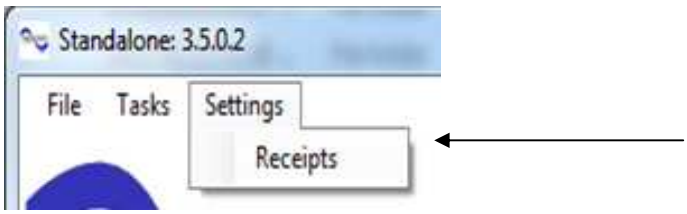


13. An Email Sent Successfully message will be displayed. Select <OK> and the user is returned to the Schedule Report screen to subscribe to more reports. To return to the main menu select <Cancel>.



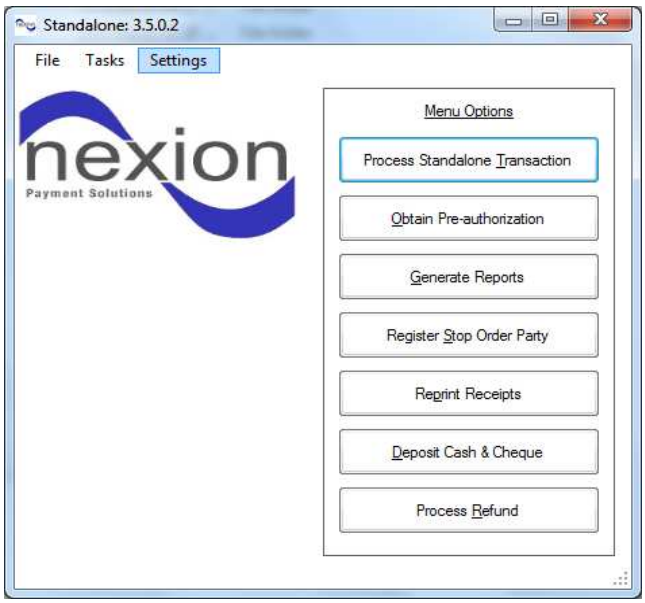
Settings Tab -

Select the “Settings” to (A) change Receipt settings, (B) Cash Drawer settings and (C) Printer settings.

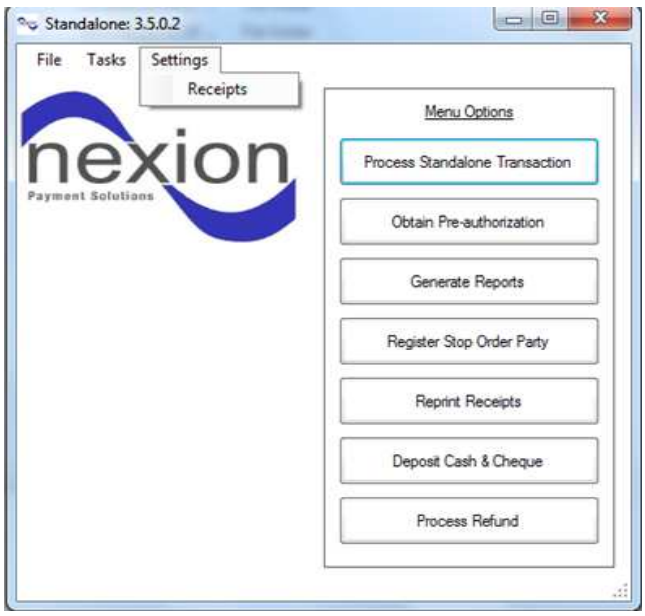


A. Receipt Settings

1. Select the “Settings” tab from the top bar of your main menu



2. Select “Receipts” from the drop down menu



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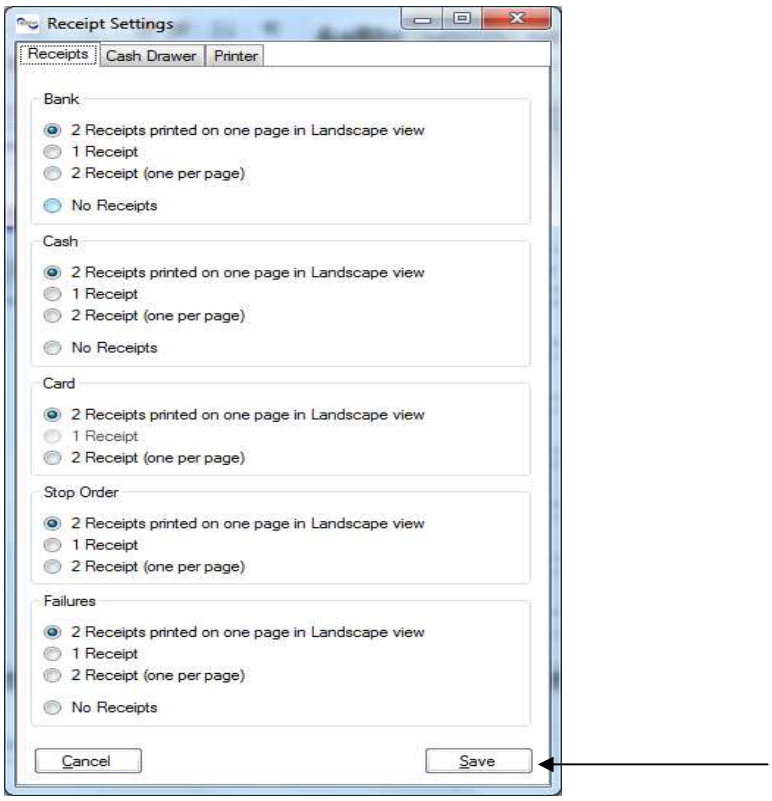
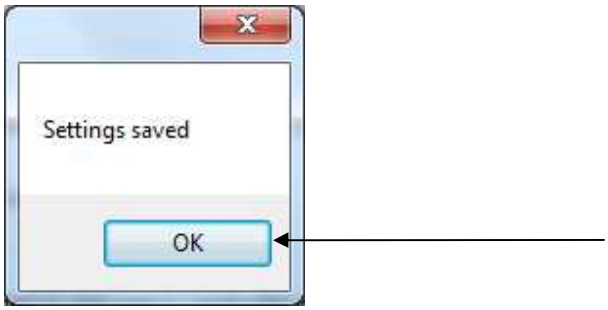
3. The “Receipts Settings” screen will be displayed. Select your desired settings and Save



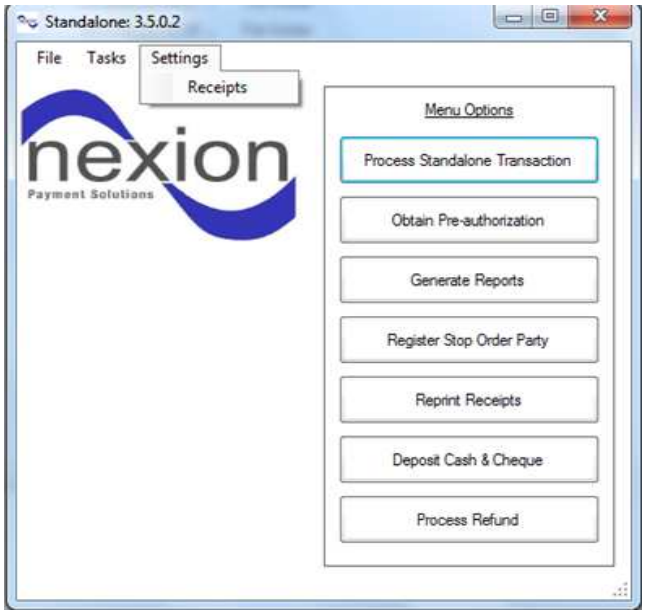
4. A settings saved screen will be displayed. Select <OK> to continue



B. Cash Drawer Settings

1. Select the “Settings” tab from the top bar of your main menu

2. Select “Receipts” from the drop down menu



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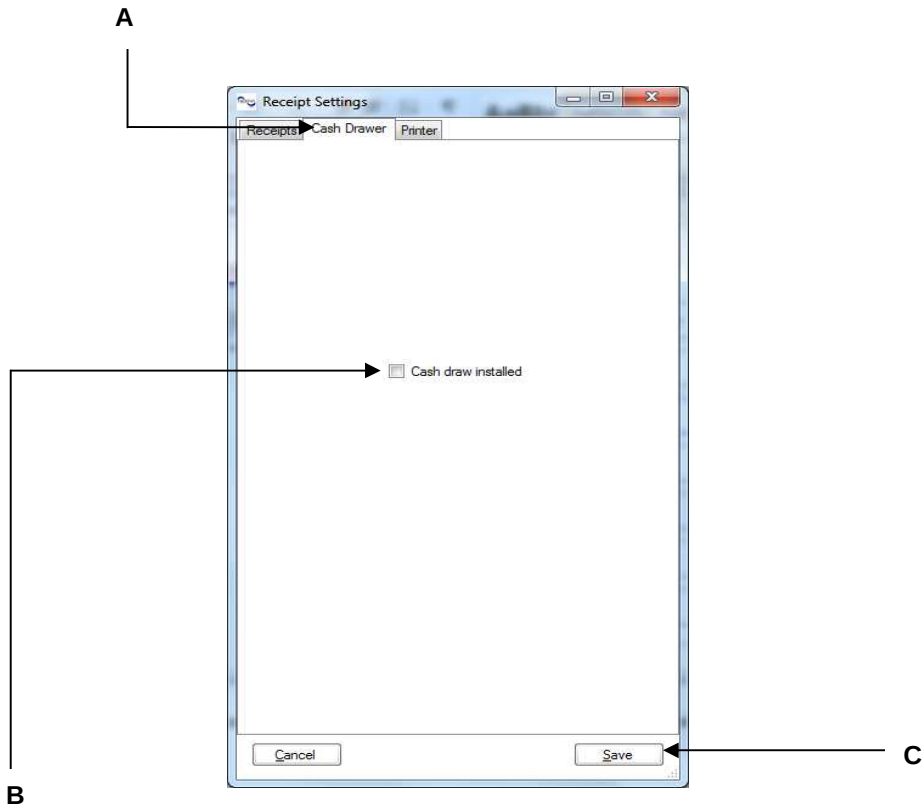
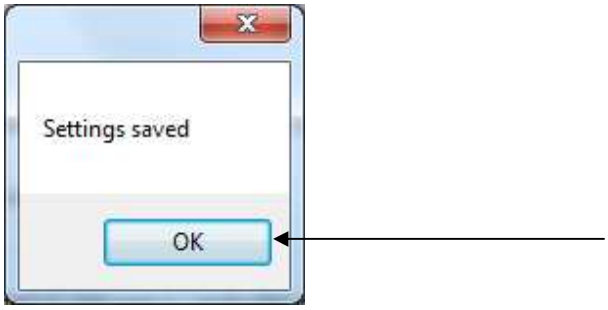
3. The “Receipts Settings” screen will be displayed.
   - (A) Select the “Cash Drawer” Tab on the top of the screen
   - (B) If a cash drawer is installed onsite tick the box that says “Cash drawer installed”
   - (C) Select Save

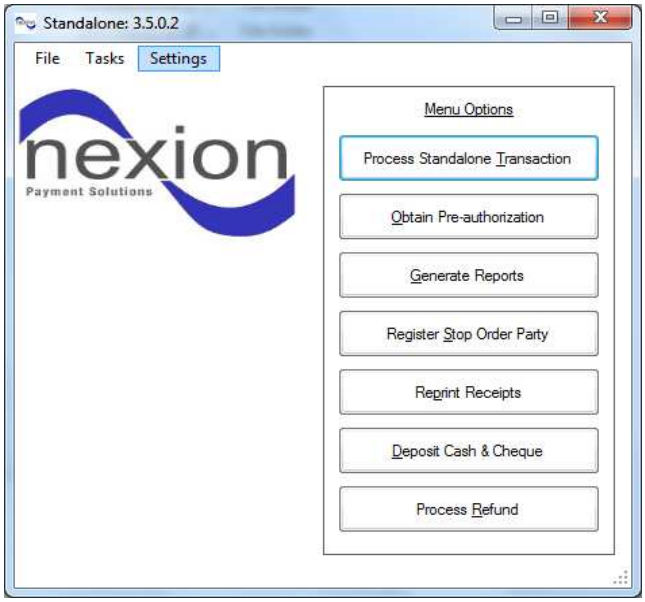


5. A settings saved screen will be displayed. Select <OK> to continue

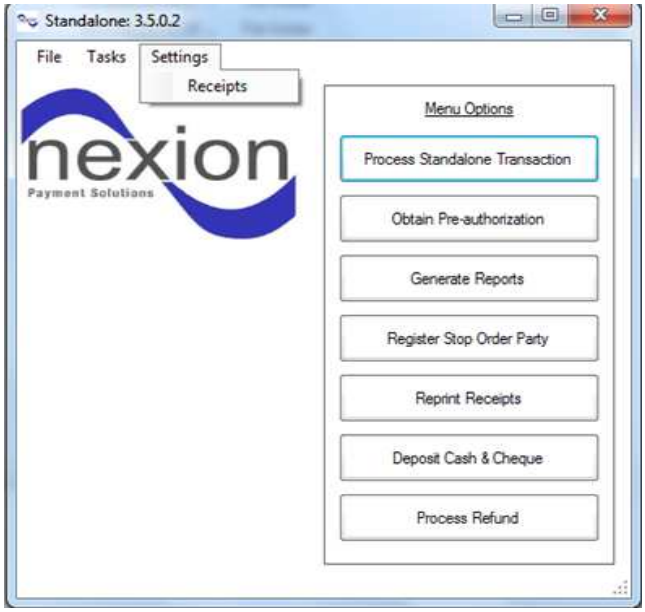


C. Printer Settings

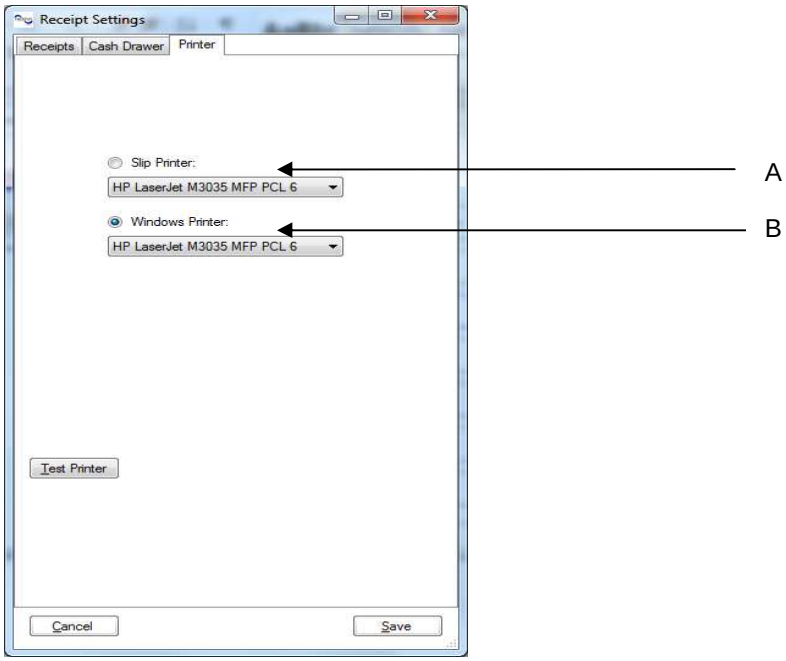
1. Select the “Settings” tab from the top bar of your main menu



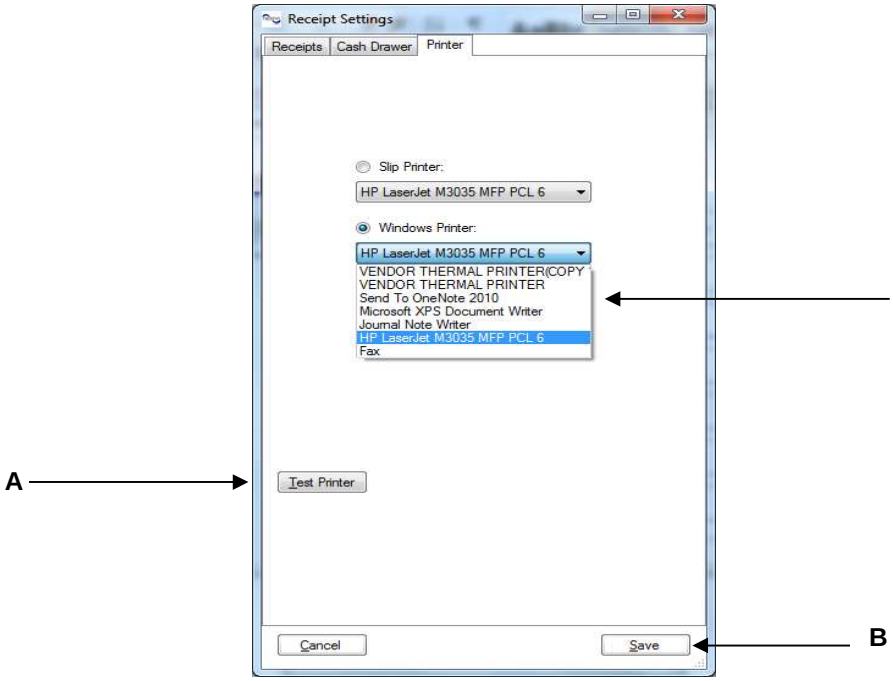
2. Select “Receipts” from the drop down menu



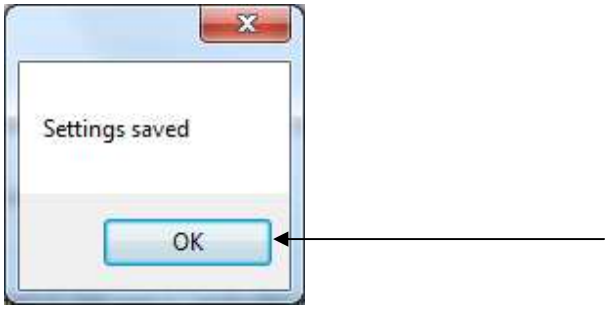
3. The “Receipts Settings” screen will be displayed. Select the desired printer type
   - (A) Slip Printer
   - (B) Windows Printer



4. Select the desired printer from the dropdown list
   - (A) Do a test print
   - (B) Select Save



5. A settings saved screen will be displayed. Select <OK> to continue



Navigating the system

The Main Menu

Buttons on the Main Menu Screen:

Process Standalone Transactions
Provides access to the payments screen where you can capture and process client payments.

Obtain Pre - Authorization
Use this option to reserve funds on a credit card, allowing you to guarantee funds for 5 to 7 working days. This feature will allow you to collect shortfalls and to lock in funds on your clients cards prior to services being rendered.

Generate Reports
Access to Bank Recon (Previously Cash Report) as well as the Submission and Pre-Auth reports
(see chapter -- page --)

Submission Report – Used to reconcile practice management/ debtor system
Generate a report detailing the transactions processed/ receipted within the selected date range.
Bank Recon Report -- Used to reconcile bank account(s)
Generate a report detailing transactions/funds that have been deposited to the practice / merchant bank account(s) within the date range selected.

Pre-Auth Report – Used to view pre-authorizations
Generate a report detailing pre-auths taken 5 to 7 days prior on a client's card.

Register Stop Order Party
Allows you to register a debtor for recurring payment such as treatment plans and for subscriptions such as contact lens programs.

Nexion enables you to deduct funds from your debtor's savings or cheque account in instalments of up to 18 months. Transactions can be processed on Nexion provided the start date (first transaction) is not later than today and no more than 30 days in the future.

Reprint Receipts
Allows you to reprint receipts
Whether it is for the last transaction processed or any previous Nexion transaction processed

Deposit Cash & Cheque
Cash & Cheque transactions will remain pending on your reports until such time when you "cash up" your till and a cash deposit detail is printed, which will then change the status to paid.

Process Refund
Use this option to do a full or partial refund against a previous transaction. Note that debit card transactions cannot be refunded directly to the card, however it an alternative refund method may be used.

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